MICROSOFT EXCEL

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Doing More with PivotTables



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3 Introduction

As you learned in our previous lesson, Intro to PivotTables, PivotTables can be used to summarize and analyze almost any type of data. To help you manipulate your PivotTable—and gain even more insight into your data—Excel offers three additional tools: filters, slicers, and PivotCharts.



Sometimes you may want focus on a certain section of your data. **Filters** can be used to **narrow down** the data in your PivotTable, so you can view only the information you need.

5 Adding a Filter

In the example below, we'll filter out certain **salespeople** to determine how their individual sales are impacting each region.

. Drag a field from the **Field List** to the **Filters** area. In this example, we'll use the **Salesperson** field.

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■ ROWS Region	∑ VALUES Sum of Order ▼
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Adding a Filter

- The filter will appear above the PivotTable. Click the dropdown arrow, then check the box next to Select Multiple Items.
- Uncheck the box next to any item you don't want to include in the PivotTable. In our example, we'll uncheck the boxes for a few salespeople, then click OK.

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4	East	Albert	Albertson, Kathy					4	East	Albert	Albertson, Kathy					
5	North	Brenne Davis.	an, Michael William					5	North	Brenn	an, Michael William					
6	South	🗹 Dumla	o, Richard					6	South	Dumla	o, Richard					
7	West	Flores	, Tia Aolisso					7	West	Flores,	, Tia Jaliasa					
8	Grand Total	Thomp	ison, Shannon					8	Grand Total	- Dost, n	oson, Shannon					
9		Walter	s, Chris					9		✓ Walter	rs, Chris					
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7 Adding a Filter

3. The PivotTable will adjust to reflect the changes.

	А	В	С	D
1	Salesperson	(Multiple Items)		
2				
3	Row Labels 🗾 👻	Sum of Order Amount		
4	East	4340		
5	South	10875		
6	Grand Total	15215		
7				
8				
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Slicers make filtering data in PivotTables even easier. Slicers are basically just **filters** but are easier and faster to use, allowing you to instantly pivot your data. If you frequently filter your PivotTables, you may want to consider using slicers instead of filters.

9 Adding a Slicer

- . Select any cell in the PivotTable.
- 2. From the Analyze tab, click the Insert Slicer command.



3. A dialog box will appear. Check the box next to the desired **field**. In our example, we'll select **Salesperson**, then click **OK**.

Insert Slicers	?	×	
Salesperson Region Account Order Amount Month			
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10 Adding a Slicer

 The slicer will appear next to the PivotTable. Each selected item will be highlighted in **blue**. In the example below, the slicer contains all eight salespeople, but only **five** of them are currently selected.

		А	В	(2	D	E	F	(G	Н
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	7					Dumlac	, Richo	ard			
	8					Flores, 1	īa				
	9								=		
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	11					Thomps	on, Sh	annon			
	12						,		=		
	13					Walters	, Ch <mark>ri</mark> s				
	14										
	15										

Adding a Slicer

5. Just like filters, only selected items are used in the PivotTable. When you select or deselect an item, the PivotTable will instantly reflect the change. Try selecting different items to see how they affect the PivotTable. Press and hold the Ctrl key on your keyboard to select multiple items at once.

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3	Row Labels 🔻	Sum of Order Amount			Albens	on, kui	iny			
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5	South	10875			Den de A	A /:!!!		\equiv		
6	West	5190		Ľ	Davis, v	william				
7	Grand Total	19225			Dumlac	, Richo	ard			
8					Flores, T	lia				
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10					Post, M	elissa				
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13					Walters	s, Ch <mark>ri</mark> s				
14							3			
15										

You can also click the **Filter icon** in the top-right corner of the slicer to select **all** items at once.

12 PivotCharts

PivotCharts are like regular charts, except they display data from a **PivotTable**. Just like regular charts, you'll be able to select a **chart type**, **layout**, and **style** that will best represent the data.

In the example below, our PivotTable is showing a portion of each region's **sales figures**. We'll use a PivotChart so we can see the information more clearly.

- . Select any cell in your PivotTable.
- 2. From the Insert tab, click the PivotChart command.

Home	Insert	Page Layout	Formulas	Data	Review	View	Analyze	Design	Ωте	ell me what you v
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Tables			Add-ins			Chart	ts	E.	Tours	Sparklines

3. The **Insert Chart** dialog box will appear. Select the desired **chart type** and **layout**, then click **OK**.

Insert Chart		?	×
All Charts			_
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4. The PivotChart will appear.



Try using **filters** or **slicers** to narrow down the data in your PivotChart. To view different subsets of information, change the **columns** or **rows** in your PivotTable. In the example below, we've changed the PivotTable to view the **monthly sales** for each salesperson.

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4	Row Labels 🧊	January	F	ebruary	March	Grand Total			
5	Albertson, Kathy		925	1375	350	2650			
6	Da∨is, William		1100	235	600	1935			
7	Flores, Tia		1655	985	1925	4565			
8	Thompson, Shannon		1140	1720	300	3160			
9	Walters, Chris		355	2755	1265	4375			
10	Grand Total		5175	7070	4440	16685			
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14	Albertson, Kathy	2500							
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20	Flores, Tia	500							
21	Post, Melissa								
22		o —							
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24	Walters, Chris	Enlocation		ar insarri		STUTTOT	01110		
25		Salespers							
26									

17 Practice

- Open our practice workbook.
- In the Rows area, remove Region and replace it with Salesperson.
- Insert a PivotChart, and choose the type Line with Markers.
 Insert a slicer for Regions.
- Use the slicer to only show the South and East regions.
- Change the PivotChart type to Stacked Column.
- In the **PivotChart Fields** pane to the right, add **Month** to the **Legend (Series)** area. **Note:** You can also click the PivotTable and then add **Month** to the **Columns** area; the result will be the same.



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